
INVESTSMART
Looking Forward,
Looking Back
TOM WILSON
INVESTOR EDUCATION
EVAN LUCAS
CHIEF MARKET STRATEGIST

DISCLAIMER

WARNING

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DISCLAIMER

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We are not tax advisers and recommend specific tax advice is sought from a qualified accountant or tax agent before entering into any arrangement.

WHAT WE WILL COVER

Lessons of 2022

Portfolio ETF Performance

What 2023 might bring

December PMA Numbers

Questions

2022 Main Themes

- Volatility in global investment markets:
  - Inflation, interest rates, energy prices, recession concerns, and geopolitical events
- Different investment markets and asset classes have had varying levels of performance
- Diversification can help reduce volatility and smooth returns
- Best-performing asset classes can vary from year to year, and sometimes the best one in one year can be the worst the next.

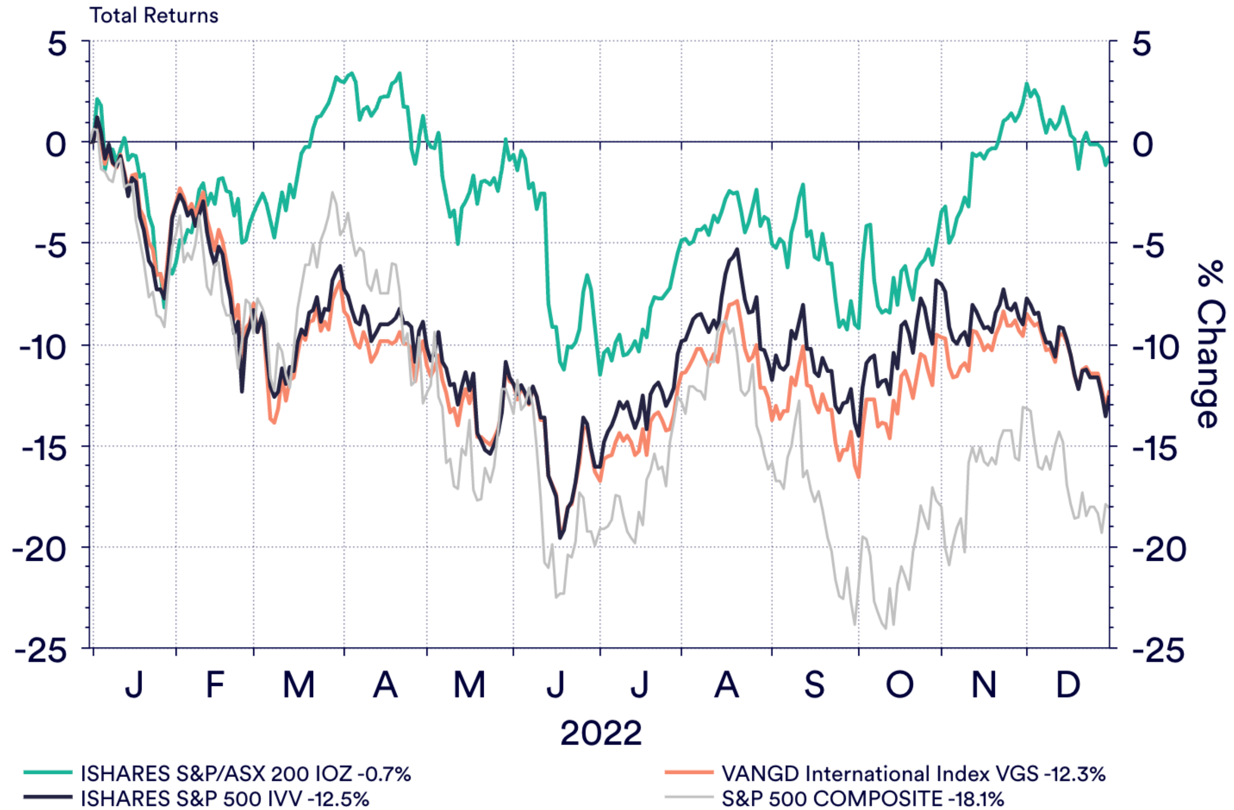
Interest Rates

- RBA Cash rate target
- 2 FEB 2022 – 0.10%
- 7 DEC 2022 – 3.10%

Inflation

- SEP 2022 – 7.3%

ETF Performances to 2022



Source: Refinitiv Datastream, InvestSMART

ETF Performances to 2022

Source: Refinitiv Datastream, InvestSMART

WHAT 2023 MIGHT BRING

Several factors that could affect the market in 2023 include:

•China easing COVID-19 restrictions

•Potential resolution to Russia-Ukraine conflict

•Economic challenges in the UK and Europe

•Disruptions to supply chains

•Natural disasters leading to higher inflation and impacting insurance companies

December PMA Numbers

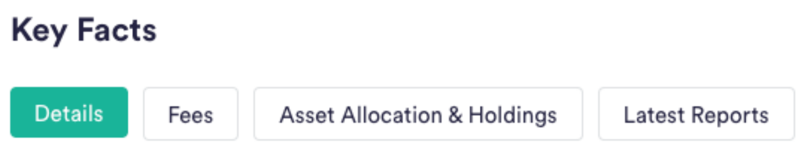
DECEMBER PMA NUMBERS

- ASX200 down 3.21% for DEC 2022

Tip:

To see the Latest Report, go to the product page, scroll down to Key Facts

Here is the Conservative portfolio
[Investsmart Conservative Portfolio]



Q&A

Thanks

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